

CMS Net

Patient ID

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Preface

Legend

In procedures on the following pages you will see various symbols used.

- ✓ When a procedure is described, the check mark indicates the result of an action.
- ➡ The arrow indicates a content note.

Patient Identification within CMS Net

Patient Identification within CMS Net

Each time you access a particular function in CMS Net, you must select the patient record you want to work with. The Patient Identification screen allows several ways to select a patient.

What is the search criteria?

A patient can be identified using the following:

- Patient Name; and/or
 - Birth date and/or Gender; and/or
 - Current Legal County (Registration Display Only)
 - California Children's Services (CCS) Number; or
 - Client Index Number (CIN); or
 - Social Security Number.
-

➡ Once you have selected a specific patient, using one or more of the above identifiers, and have not left CMS Net or selected another patient, the name will always default to the original patient selected.

➡ **The CIN is a permanent part of the CMS Net patient record and cannot be deleted by the user.** It can be linked to another Statewide Client Index (SCI) record. If a duplicate SCI record/CIN is created, send the duplicate record information to the System Administrator via Mailman. Only an SCI Administrator can delete a CIN number.

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Patient Identification within CMS Net, Continued

**Patient
Identification
Screen**

The Patient Identification screen is used to select a patient record from the option you selected (e.g., Narrative Entry/Edit).

**How do I
access the
Patient
Identification
screen?**

Any function in which a patient's case is affected, the Patient ID screen will appear (CMSPI-10), regardless of what menu option is selected.

- ➡ You will reach the Patient ID screen via the most menu options.

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Patient Identification within CMS Net, Continued

Patient
Identification
Screen

After pressing <Enter>, the Patient ID screen is displayed:

CMSNET	PATIENT IDENTIFICATION	CMSPI-10
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Enter one of the following identifiers:

CCS Number:

Pt Name: Birthdate:

Current Legal County: *(Registration Display only)* Gender:

Client Index Number:

Social Security Number:

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Patient Identification within CMS Net, Continued

Field Descriptions and Requirements.

The following is a table, which describes the fields and defines the requirements used in Patient Identification.

Field	Description and Requirements
CCS#	Enter CCS#, if known <ul style="list-style-type: none"> No other data required if this field is entered.
Patient Name	LASTNAME APP, FIRSTNAME MI <ul style="list-style-type: none"> No other data required if this field is entered but if you choose to further refine your search criteria, you may use Date of Birth and/or Gender Hints: <ul style="list-style-type: none"> You can type 2 letters of LASTNAME, comma, 2 letters of FIRSTNAME (helps to find names with a variety of spellings). Asterisks are NOT allowed for search. Periods are not allowed in a name. Hyphens and apostrophes are acceptable. When searching names, be sure to account for potential duplicate entries; e.g., Gonzalez, Gonzales, Gonsales Appellations (e.g., JR) are typed after the LASTNAME and before the comma; e.g., HARPER JR, HOWARD R.
Date of Birth	MM/DD/YYYY or MM-DD-YYYY <ul style="list-style-type: none"> Examples are 1/1/1998 or 1-1-1998 If a 2-digit year is entered, the system will assume it is in the 1900s. It is not necessary to enter leading zeroes.
Gender	(M)ale or (F)emale, <ul style="list-style-type: none"> You must enter date of birth if you want to search on this field.
CIN	Enter Client Index Number, if known <ul style="list-style-type: none"> No other data required if this field is entered.
Social Security Number	NNN-NN-NNNN or NNNNNNNNNN <ul style="list-style-type: none"> Examples are 624-92-7555 or 624927555 No other data required if this field is entered.

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Patient Identification within CMS Net, Continued

Field	Description and Requirements
Current Legal County	<p>This field displays only on the Registration Display Patient Identification screen</p> <ul style="list-style-type: none"> • Patient Name and/or Date of Birth fields must be populated in combination with the Currently Legal County. If the Patient Name or Date of Birth is not populated the field will be bypassed. • Partial county name can be entered.

Data Entry Steps

The following steps begin the search for a patient on CMS Net:

Step	Action
1	<p>Enter any one of the following sets of information into the Patient Identification Screen:</p> <ul style="list-style-type: none"> • Patient Name (in upper case letters with no spaces between characters), AND/OR • Birthdate AND/OR Gender, AND/OR • Current Legal County (Registration Display only) • CCS Number, OR • Client Index Number OR • Social Security Number
2	Press < Enter>.

➡ To move from one field to the next, press the **<down arrow>** key. To go back to a previous field, press the **<up arrow>** key.

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Patient Identification within CMS Net, Continued

Search by one or more the following: Patient Name, Date of Birth, Gender or Current Legal County

Entering Patient Name and/or Date of Birth and/or Gender and/or Current Legal County as additional search criteria provides a more refined patient record search. If you choose to enter a name or partial name, the search will not begin until data is entered in the Date of Birth and/or Gender and/or Current Legal County fields or cursor through them.

Step	Action
1	Type Pt. Name (LASTNAME APPELLATION,FIRSTNAME) OR Type the first few letters of the LASTNAME, comma, and first few letters of the FIRSTNAME and/or Type the Date of Birth MM/DD/YYYY or MM-DD-YYYY and/or Type the Gender (M) Male or (F) Female
2	Press < Enter>

CMSNET	PATIENT IDENTIFICATION	CMSPI-10
<hr/> <p>Enter one of the following identifiers:</p> <p>CCS Number:</p> <p>Pt Name: SMITH,AARON CASEY Birthdate:</p> <p>Current Legal County Gender:</p> <p>Client Index Number:</p> <p>Social Security Number:</p>		

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Patient Identification within CMS Net, Continued

**Standard
Patient
Identification
Pick List**

The data is from the most recent program eligibility period, regardless of the Patient Registration case status. It will be used on all patient identification screens *except* Edit/Duplicate Bad Record.

A patient may have one or more alias names The system will indicate if the name searched is [A] Alias or [B] Birth Name.

The example below displays with an Alias identifier [A].

Alias

Select Patient:	
() WRONG,KID	Gender: M DOB: 08/06/1999 [A]
CCS#: 3266639 CIN: 90003945D 2 Legal County: SAN LUIS OBISPO	
Reg=ACT Med=E F/R=E Pgrm End Dt: 12/31/1999 CCS Elig Stat:9R-HF;Over CCS	
[More] [Previous] [Quit]	

Below is an example of the Edit/Duplicate Bad Record pick list. It displays with a Birth Name identifier [B].

Birthname

Select Patient:	
() WRONG,KID	Gender: M DOB: 08/06/1999 [B]
CCS#: 3266639 CIN: 90003945D 2 Legal County: SAN LUIS OBISPO	
Reg=ACT Med=E F/R=E Pgrm End Dt: 12/31/1999 CCS Elig Stat: 9R- HF;Over CCS	
Record Status= Dup of 3298654	
[More] [Previous] [Quit]	

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Patient Identification within CMS Net, Continued

✓ After the User presses <Enter>, there are several options, which could happen. Each one will be described in the following pages.

- If no patient is found
 - If one patient is found
 - If patient displayed is correct
 - If patient displayed is incorrect
 - If more than one patient is found
 - To select a new patient
-

If no patient is found

If no patient is found, the following message will appear:

Patient not found or selected on CMS Net
(?) Press Enter

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Patient Identification within CMS Net, Continued

Step	Action
1	Press <Enter>. ✓The cursor returns to the first field in <i>Pt. Name</i> .

After receiving “Patient not found or selected on CMS Net” message:

Step	Action
1	Press Action Menu key. PC = F2 T = F11 ✓The following drop down prompt would appear.

Select One:

() New Patient

() Return Menu

[Quit]

Patient Identification within CMS Net, Continued

Step	Action
1	Press the <Up Arrow> key to <i>New Patient</i> (or type N).
2	Press <Enter>.

Select One:

(?) New Patient

() Return Menu

[Quit]

If Patient Registration option was selected, the SCI Search screen will appear.

- ➡ All patients on CMS Net now require a CIN. You cannot complete Patient Registration without first obtaining a CIN.

Please refer to the Patient Identification within SCI section of this manual.

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Patient Identification within CMS Net, Continued

**If one patient
is found**

If one patient is found, the following will appear:

Select Patient:

() STRACENER,CHRISTOPHER ANTHONY Gender: M DOB: 06/07/1991
CCS#: 2423663 CIN: Legal County: MERCED
Reg=ACT Med=E F/R=E Pgrm End Dt: 12/31/1999 CCS Elig Stat:9R-HF;Over CCS

[Quit]

➡ You will have two (2) options with this information:

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Patient Identification within CMS Net, Continued

If patient displayed is correct

If the patient displayed is the correct one, do the following:

Step	Action
1	Move Cursor with <up arrow> key to the () in front of the <i>Patient Name</i> .
2	Press <Enter>.

If patient displayed is not correct

If the patient displayed is not the correct one, do the following:

Step	Action
1	With the Cursor on Quit.
2	Press <Enter>.

Patient Identification within CMS Net, Continued

**If more than
one patient is
found**

If more than one patient is found, a pick list will appear.
For example:

Select Patient:

() SMITH, TAMMY	Gender: F DOB: 05/17/1982
CCS#: 3273347 CIN:	Legal County: MERCED
Reg=ACT Med=E F/R=E	Pgrm End Dt: 12/31/1999 CCS Elig Stat: 9K-CCS
() SMITH, TANIA JEWEL	Gender: F DOB: 04/17/1971
CCS#: 2354382 CIN:	Legal County: TRINITY
Reg=ACT Med=E F/R=E	Pgrm End Dt: 12/31/1999 CCS Elig Stat: 9K-CCS
() SMITH, TANNER	Gender: M DOB: 10/25/1997
CCS#: T37484 CIN:	Legal County: PLACER
Reg=ACT Med=E F/R=E	Pgrm End Dt: 12/31/1999 CCS Elig Stat: 9K-CCS
() SMITH, TASHA MONIQUE	Gender: F DOB: 05/26/1979
CCS#: 3277034 CIN:	Legal County: NAPA
Reg=ACT Med=E F/R=E	Pgrm End Dt: 12/31/1999 CCS Elig Stat: 9K-CCS

[MORE] [QUIT]

Patient Identification within CMS Net, Continued

To select the correct patient:

Step	Action
1	Press the <Up Arrow> key to move the cursor to the () in front of the <i>Patient Name</i> .
2	Press <Enter>.

To see more selections, do the following:

Step	Action
1	Place the cursor (highlight) on [MORE].
2	Press <Enter>. ✓The next selections will appear.

➡ After you select a patient, the appropriate screen will appear for the option you are in.

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Patient Identification within CMS Net, Continued

To quit without selecting any patients from the pick list, do the following:

Step	Action
1	Move the cursor (highlight) to [QUIT].
2	Press <Enter>.

Cancel Patient Identification

To cancel (or “escape”) from the Patient Identification screen, do the following:

Step	Action
1	Press Shift and F2 at the same time (if PC) OR Press F11 (if Terminal).

When you return to the Patient Identification screen, the patient name that was last selected will appear.

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Patient Identification within CMS Net, Continued

To Select the Same Patient

To select the same patient, just press <enter>.

➡ Important note to remember. Until you delete that Patient Name and reenter a new one or logoff CMS Net, that Patient Name is what you will access as you continue working within CMS Net.

To Select a New Patient

To select a new patient, press <F7> to clear the patient name field, then type in the new information.

➡ The last patient information will continue to appear until you logoff CMS Net or enter a new patient's name.

You have completed searching CMS Net to identify your patient.

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Patient Identification within CMS Net, Continued

NOTES

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